





20 F Street, NW, Suite 800 Washington, DC 20001  
202 872 5500 [www.software.org](http://www.software.org)

**Mr. Dan Lips  
Committee on Homeland Security and Governmental Affairs  
United States Senate  
340 Dirksen Senate Office Building  
Washington, DC 20510**

**Re: Staff Delegation Trip to San Francisco Bay Area, Oct. 22-24**

Dear Mr. Lips,

Software.org is headed to the **San Francisco Bay Area** for a series of nuanced conversations with cybersecurity experts and the U.S. DoD Defense Innovation Unit. I'm writing to invite you to join us for this **Oct. 22-24 congressional staff delegation trip** focused on key cybersecurity issues.

## Agenda

The trip will begin with a morning flight on Monday, Oct. 22, with company visits to follow Monday and Tuesday. On Wednesday, the trip will continue with company visits before our afternoon return.

## Ethics/Costs

Software.org will cover all approved costs associated with this trip including airfare, hotel expenses, and group meals. This trip has been structured to comply with House and Senate ethics rules. For your convenience, Software.org will provide necessary paperwork for submission before the 30-day House and Senate ethics deadline.

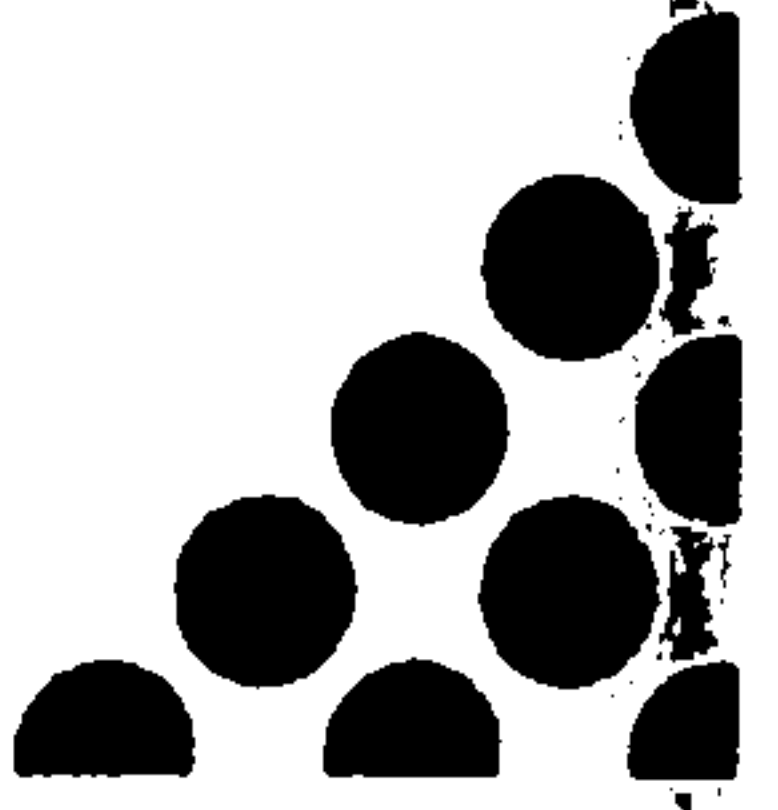
Sincerely,

Chris Hopfensperger  
Executive Director, Software.org

## About Software.org

**Software.org: the BSA Foundation is an independent, nonpartisan, international 501(c)(3) research organization established to help people better understand the impact software has on our lives, our economy, and our society. Headquartered in Washington, DC, the foundation publishes studies that examine the intersection of software and society, and it engages with policymakers and the public to inform policies that can stay ahead of cutting-edge technologies. The foundation also works directly to empower the workforce of tomorrow by encouraging a diverse community of young coders and working to increase opportunities for training and skills. Follow Software.org at @BSA Foundation.**

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# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

**Post-Travel Filing Instructions:** Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**  
☐ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Software Education Foundation d.ba. Software.org; the BSA Foundation

Travel date(s): 10/22/18 -- 10/24/18

Name of accompanying family member (if any): None

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

## Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input checked="" type="checkbox"/> Actual Amount	697.65	367.00	172.91	

## Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate <input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. *See Senate Rule 35.2(c)(6).* (Attach additional pages if necessary.): See attached agenda.

12/19/18 DANIEL LIOS Daniel P. Lios  
(Date) (Printed name of traveler) (Signature of traveler)

## TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

12/19/18 Ran Johnson  
(Date) (Signature of Supervising Senator/Officer)

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The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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24 23 22 21 20 19 18 17 16 15 14 13 12 11 10 9 8 7 6 5 4 3 2 1

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment of the trip.*

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:**

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

**Software.org is the sole sponsor and organizer for this trip.**

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

**See attachment**

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

**This is Software.org's sixth trip for Congressional staff. Software.org co-sponsored a trip in 2018 for**

**Senate staff.** This is the first trip for Senate staff for which Software.org is the sole sponsor.

Private Sponsor Certification - Page 2 of 4

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Software.org educates policymakers, stakeholders, and the general public through meetings and briefings and by developing and publishing studies and papers that explain policy, new technologies, and other topics of the interest to the software industry.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	\$815.15	\$367	\$190.00	None
<input type="checkbox"/> Actual Amounts	(\$440.15, airfare; \$375, coach bus transportation)	(\$208 Sunnyvale; \$159 Oakland)		

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip involves events that are arranged and organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

Software.org chose San Francisco due to the number of software companies with major offices located in close proximity, allowing Software.org to better showcase the industry's approach to cybersecurity.

19. Name and location of hotel or other lodging facility:

Holiday Inn Sunnyvale, 852 W. El Camino Real, Sunnyvale, CA 94087

Inn at Temescal, 3720 Telegraph Ave., Oakland, CA 94609

20. Reason(s) for selecting hotel or other lodging facility:

The locations were chosen because their rates met the daily per diem rates for the jurisdictions in which they are located.



21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The daily expenses for lodging and meals will be below the daily per diem rates for Sunnyvale and Oakland, California.

- 22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:**

Round-trip coach airfare from Washington, DC (DCA) to San Francisco (SFO); ground transportation will be provided by coach class charter bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

none

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

**Signature of Travel Sponsor**

**Name and Title:** Chris Hopfenberger, Executive Director

**Name of Organization:** The Software Education Foundation d/b/a Software.org: the BSA Foundation

**Address:** 20 F Street, NW, 8th Floor, Washington, DC 20001

**Telephone Number:** 202-530-5135

**Fax Number:**

**E-mail Address:** [chris@software.org](mailto:chris@software.org)



**Day 1 (Monday, October 22)**

6:30 AM Meet at gate, Ronald Reagan International Airport (DCA)

8:05 AM EST United Flight 2042 from DCA to San Francisco International Airport (SFO)

11:00 AM PST United 2042 arrives at SFO

12:00 PM Bus transport to Salesforce.

12:30 PM **Salesforce – Lunch Served at Salesforce**  
Location: 350 Mission Street

At Salesforce, attendees will meet with Eric Loeb, EVP for Policy, and Taher Elgami, CTO, Security, for an in-depth conversation about the company's approach to cybersecurity, the threat landscape, and the role of public policy in promoting stronger cybersecurity solutions.

2:30 PM Depart Salesforce. Bus transport to Adobe.

3:00 PM **Adobe**  
Location: 601 Townsend Street, San Francisco

During the visit to Adobe, the delegation will meet with Brad Arkin, the company's Chief Security Officer, to discuss the cyber threat landscape and how public policy impacts cybersecurity programs.

4:00 PM Depart Adobe. Bus transport to IBM.

4:30 PM **IBM**  
Location: 425 Market Street, San Francisco

During the visit to IBM, attendees will meet with the companies leading cybersecurity experts for an in-depth conversation on the cybersecurity environment and how IBM solutions, such as cognitive cybersecurity technologies, are helping companies stay secure. Attendees include Wendi Whitmore, Global Partner and Director, IBM X-Force Threat Intelligence, and Mitch Mayne, Public Information Officer, IBM X-Force Threat Intelligence.

5:30 PM Depart IBM. Bus transport to Bistro Boudin

6:00 PM Arrive at Bistro Boudin

6:00 PM **Dinner with Siemens Head of Cybersecurity**  
Location: Bistro Boudin, 160 Jefferson Street, San Francisco

Over dinner at Bistro Boudin, attendees will engage in a detailed conversation on Siemens's approach to cybersecurity with Leo Simonovich, VP and Global Head, Industrial Cyber and Digital Security.





8:00 PM Dinner concludes. Attendees depart for Sunnyvale Hotel  
Holiday Inn  
Location: 852 W El Camino Real, Sunnyvale, CA 94087

9:00 PM Arrive at Sunnyvale Hotel.

**Day 2 (Tuesday, October 23)**

9:00 AM Group meets in hotel lobby.  
Bring luggage to lobby and please check out.  
*Breakfast served in hotel lobby. Bus transport to Apple.*

9:30 AM **Apple**  
Location: 2 Apple Park Way, Cupertino, CA

During the visit to Apple's campus, attendees will meet with company executives for an in-depth conversation about the company's approach to cybersecurity, the current threat landscape, and public policy's impact on digital security. Ivan Krstic (Head of Security Engineering and Architecture) and George Stathakopoulos (VP of Corporate Information Security) will be speaking with the group.

11:00 AM Depart Apple. Bus transport to DIU.

11:30 AM **DIU – Lunch Served at DIU**  
Location: 230 R.T. Jones Road, Mountain View, CA

At DIU's Mountain View headquarters, attendees will meet with DIU leadership to discuss the organization's mission and work. DoD established DIU to accelerate commercial innovation to the warfighter in order to meet the changing demands of today's strategic and technological environments. It is2 DIU's mission to lead DoD's break with past paradigms of military-technical advantage to become fast adapters -- as opposed to sole developers -- of technology, integrating the advanced commercial capabilities necessary for strategic advantage. In this hyper-competitive environment, DoD is moving to prioritize speed of delivery, rapid and modular upgrades, and quick operational adaptation on the battlefield. The delegation discussion will include a focus on cybersecurity and artificial intelligence, as well as a tour of the department's current work on counter Unmanned Aerial Systems. Attendees include Director Michael Brown; Ajay K. Amlani, CEO in Residence; Pavneet Singh, Defense Innovation Unit; Mike Kaul, Artificial Intelligence and Machine Learning Portfolio Lead; Zach Walker, IT Portfolio Lead, Austin Unit; Captain Rachel Kolesnikov-Lindsey, Space Portfolio; LtCol Mark Jacobsen, Program Manager, Rogue Squadron; and Jameson Darby, Autonomy Portfolio Lead.

1:30 PM Depart DIU. Bus transport to FireEye.

2:00 PM **FireEye**  
Location: 601 McCarthy Blvd, Milpitas, CA 95035

At FireEye, attendees will meet with FireEye experts and executives to discuss the company's three-prong business structure and approach to cybersecurity. Speakers included Kevin Mandia, CEO; Vasu Jakkal, Chief Marketing Officer, FireEye; Ben Forster, Product Marketing Manager; Sean Underwood, Intelligence Principal, Government Accounts; and Charlie Baisley, Director of Strategic Alliances and Government Affairs.



3:30 PM Depart FireEye. Bus transport to Symantec.

4:00 PM **Symantec**  
Location: 370 Ellis Street, Mountain View

Attendees will meet with Symantec executives for an in-depth conversation on the company's approach to cybersecurity and the cybersecurity landscape. Attendees include Steve Trilling, Senior Vice President and General Manager, Security Analytics and Research.

5:30 PM Depart Symantec. Bus transport to dinner with Workday.

6:30 PM **Dinner in Silicon Valley**  
Location: Trader Vics Emeryville

Josh DeFigueiredo, Vice President, Chief Information Security Officer at Workday, had been invited to speak, but unfortunately had to cancel.

8:00 PM Depart dinner for Oakland Hotel – Inn at Temescal

8:30 PM Arrive at Inn at Temescal  
Location: 3720 Telegraph Avenue, Oakland, CA 94609

**Day 3 (Wednesday, October 24)**

7:45 AM Group meets in hotel lobby. Bus transport to Microsoft.  
*Bring luggage to lobby and please check out. Takeaway breakfast served in hotel lobby*

8:30 AM **Microsoft**  
Location: 1355 Market Street, San Francisco

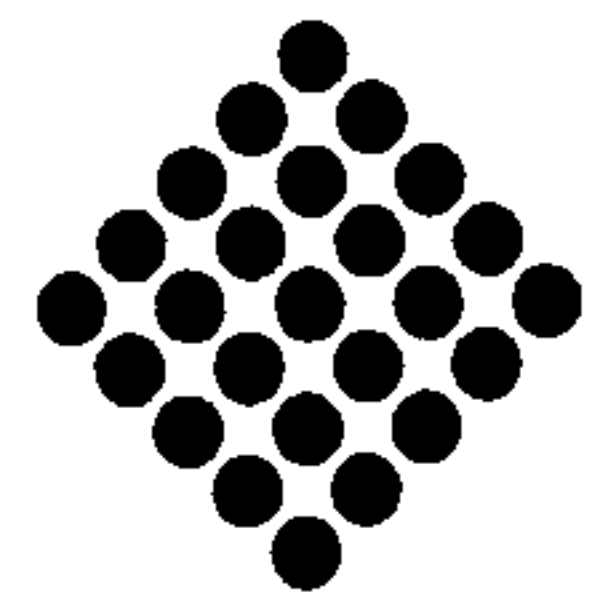
During the visit to Microsoft, attendees will meet with top cybersecurity officials for an in-depth conversation about the company's approach to cybersecurity and the company's defending democracy program. Invited Microsoft speakers include Kate O'Sullivan, General Manager, Digital Diplomacy; Jan Neutze, Director of Cybersecurity Policy, Digital Diplomacy; and Jamal Edwards, Policy Program Manager, Digital Diplomacy.

9:30 AM Depart Microsoft. Bus Transport to Okta.

10:00 AM **Okta**  
Location: 300 Brannan Street, San Francisco

At Okta, attendees will meet with the company's senior cybersecurity executives to discuss the cyber threat environment, enterprise ID management, and access management, among other things. Speakers include Yassir Abousselham, Chief Security Officer for Okta, and Jon Runyan, General Counsel for Okta.





**software.org**  
BSA Foundation

11:00 AM	Depart Okta. Bus transport to SFO.
12:00 PM	Check in at SFO.
1:15 PM PST	United Flight 2046 from SFO to DCA.
9:30 PM EST	United Flight 2046 lands at DCA.

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- Private Sponsor Certification - Page 1 of 4



**9. USE ONLY IF YOU CHECKED QUESTION 6(B)**

**I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:**

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

**-OR-**

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (see questions 6 and 10).

**- OR -**

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

**10. USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

- 12. Briefly describe the role of each sponsor in organizing and conducting the trip:**

**Software.org is the sole sponsor and organizer for this trip.**

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- 13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:**

**See attachment**

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This is Software.org's sixth trip for Congressional staff. Software.org co-sponsored a trip in 2018 for

**Senate staff.** This is the first trip for Senate staff for which Software.org is the sole sponsor.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Software.org educates policymakers, stakeholders, and the general public through meetings and briefings and by developing and publishing studies and papers that explain policy, new technologies, and other topics of the interest to the software industry.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
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Oakland, California.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

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be provided by coach class charter bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

none

25. I hereby *certify* that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):

Signature of Travel Sponsor: 

Name and Title: Chris Hopfensperger, Executive Director

Name of Organization: The Software Education Foundation d/b/a Software.org: the BSA Foundation

Address: 20 F Street, NW, 8th Floor, Washington, DC 20001

Telephone Number: 202-530-5135

Fax Number:

E-mail Address: chris@software.org